



Holden Comprehensive Cancer Center



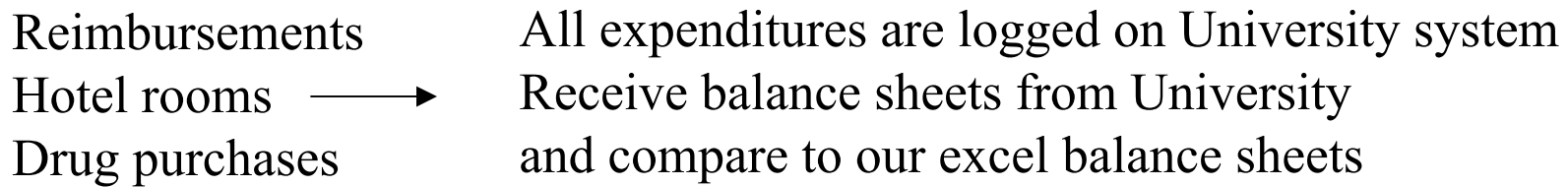
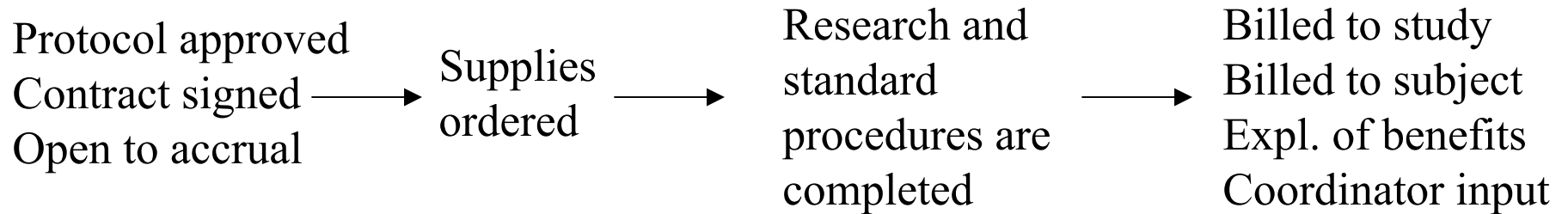
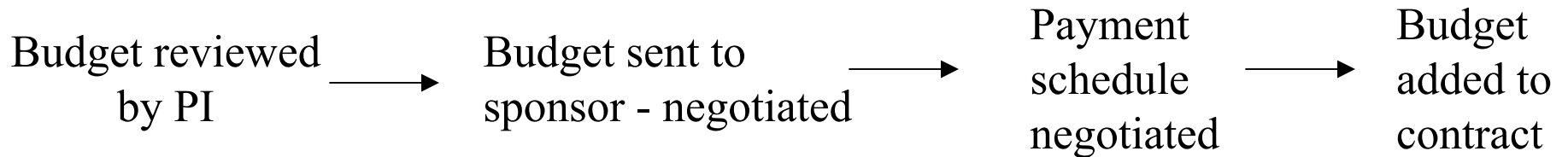
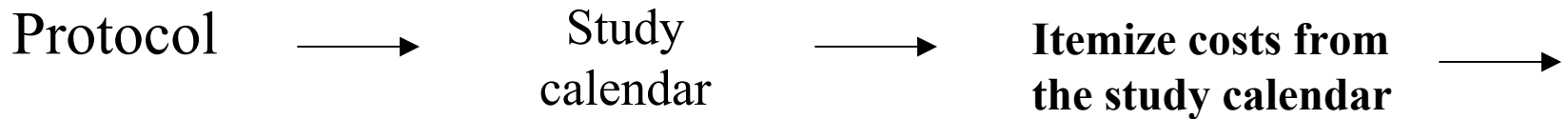
A Comprehensive Cancer
Center Designated by the
National Cancer Institute

Financial/Billing Process at the Holden Comprehensive Cancer Center's Clinical Trials Support Core

7/19/2004

UPMC

NCI Sponsored - caBIG



Protocol

Received from sponsors as a hard copy or pdf.



For an investigator initiated trial, it's common to have duplicate versions of the protocol in different directories due to the inability to share across drives.

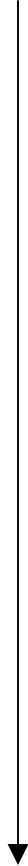
Study calendar

Located in protocol from sponsors - hard copy or pdf.



For an investigator initiated trial, there may or may not be a study calendar in the protocol (Microsoft Word)

Itemize costs from the study calendar



Procedure costs such as labs, radiology, cardiology and nuclear medicine, are documented by calling each department and talking to the one person who keeps track of the cost data. The cost data changes frequently so we need to call for each protocol.

Salaries are documented as a percent of time spent working on the research study (UIRIS system).

Other costs for overhead/indirect costs are straight percentages of the total amount funded.

These costs are summarized in a budget that is created on an excel template.

**Budget
reviewed by PI**



**Budget sent to
sponsor - negotiated**



**Payment
schedule
negotiated**



**Budget
added to
contract**



The budget is created using an Excel spreadsheet template. The spreadsheet is sent to PI via email or hard copy for their review.

The sponsor is also reviewing the budget (email or hard copy) and negotiations between the PI and sponsor are resolved.

The finalized budget (excel) is signed by the PI and added to the contract.

Once everyone has signed the contract with the approved budget, the study information is added to UIRIS to generate an MFK (account) number and a hard copy, routing form that PIs and other administrators must sign to open the account.

**Protocol approved
Contract signed
Open to accrual**



**Supplies
Ordered**



**Research and
standard
procedures are
completed**



**Reimbursements:
Travel, hotel rooms,
interdepartmental**

After IRB approval and the contract is signed, the study can enroll subjects.

Hard copy, triplicate purchase requisitions are completed and logged into a University system.

All procedures are scheduled by calling the appropriate department scheduler. The scheduler logs the appointment into a University system which can be viewed through an interface (INFORMM) by the research team.

A University accounts payable system is used to track reimbursements and travel expenses.

- Billed to study**
- Billed to subject**
- Expl. of benefits**
- Coordinator input**

The finance person will learn that procedures need to be invoiced/paid by various methods: procedures are billed to the study; procedures are billed to the subject; we receive an explanation of benefits from the hospital, subject, or insurance company; the coordinator may alert the finance person.

The finance person and research coordinator determine which procedures are standard (billed to insurance) and which are research. Invoices are created using a Microsoft Word template for research procedures.

Debits and credits are tracked on a University general ledger system – (GDLSS). Our finance person uses this system to reconcile our own balance sheets (excel).

Summary

- There are several University, stand-alone systems that must be utilized to complete the financial/billing process.
- Many of these systems are being drastically modified in the next 1-2 years. The University is moving towards integrated, online systems.
- What can we do for our Cancer Center... develop a system to create study calendars, budgets, automate invoicing by tracking completed procedures (research vs standard) and staff time